



TRANSIT BENEFIT PROGRAM APPLICATION SYSTEM PROGRAM ADMIN USER GUIDE

Submitted by

TRANServe

A division of the

Office of Financial Management and Transit Benefit Programs

Office of the Secretary of Transportation

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1. OVERVIEW

1.1 Background

The Department of Transportation, Transportation Services Division (TRANServe), administers the Transit Benefit Program for DOT and as Service Provider to other federal agencies, nation-wide. The Office currently supports federal agencies and sub-agencies, providing timely and efficient transit benefit program services to customers who will use TRANServe's Transit Benefit Application System. Services include purchasing and distributing mass transit fare media.

TRANServe's Electronic Application System serves as the publicly accessible interface for managing Transit Benefit Program Applications. The current application system is available on-line through the internet and is optimized for desktop and mobile devices. Federal government employees can apply for the transit benefit, request information, withdraw from the program and recertify. Agency Program Offices and Approvers are able to view, update, approve, or disapprove applications using the System.

1.2 Purpose

The Transit Benefit Application System user guide is designed to provide written instruction on how to use the application effectively and efficiently. Screenshots serve as examples. Field labels may not be Agency specific.

1.3 Document Organization

The following typographical conventions are used in this user guide:

- **Courier New Bold** Indicates a button on a page
- *Underline Italic in blue* Indicates a link within the system
- Title Case plus page Indicates a name of a page in the application
- *Italic text* Indicates a note on a page in the application

1.4 Points of Contact

The table below provides a list of contact for additional information regarding the Transit Benefit Application process.

Role	Name/Phone	Title	Email
Primary Contact	INSERT	Transit Benefit Manager	INSERT
Minimal Contact	INSERT	EFM Support Team	INSERT
First Level Manager	INSERT	Program Supervisor	INSERT
Second Level Manager	INSERT	Operations Project Manager	Stacey.Clark@dot.gov

2. ACCESSING THE TRANSIT BENEFIT APPLICATION

2.1 Login Screen

Use the following steps to access the application:

- a. Enter the URL: <http://transitapp.ost.dot.gov> . The Transit Benefit Application System home page is displayed.

The screenshot shows the login page of the Transit Benefit Application System. At the top, there is a header with the U.S. Department of Transportation logo on the left and the TRANSERVE logo with the tagline "Business in motion" on the right. Below the header, there is a "Login" section with a "Log In" button. Above the login fields, there is a note: "* indicates required field." The login fields are labeled "*User Name:" and "*Password:". The User Name field has a placeholder text "Government Email Address". The Password field has a placeholder text "Enter password". To the right of the Password field, there is a link "Forgot Password?". Below the login fields, there is a link "Not registered yet?" and a "Register" button. Below the register link, there is a warning message: "**WARNING**WARNING**WARNING**". The warning message states: "You are accessing a U.S. Government information system, which includes this computer, the computer network on which it is connected, all other computers connected to this network, and all storage media connected to this computer or other computers on this network. This information system is provided for U.S. Government use only. Unauthorized or improper use of this information may result in disciplinary action, as well as civil and criminal penalties. By using this information system you consent to the following: 1. You have no reasonable expectation of privacy regarding any communications or data transiting this network or stored in this information system." Below the warning message, there is another warning message: "**WARNING**WARNING**WARNING**". At the bottom of the page, there is a date: "Friday, January 10, 2016".

Figure 1: Transit Benefit Application Log In page

First time users must register. Use the following steps:

- b. Click the **Register** button. The Register Account Information page is displayed.

The screenshot shows the "Register Account Information" page. It has a title "Register Account Information" at the top. Below the title, there are several input fields: "*User Name:" with a placeholder "Government Email Address", "*First Name:" with a placeholder "First Name", "Middle Name:" with a placeholder "Middle Name", "*Last Name:" with a placeholder "Last Name", "*Agency/Mode:" with a dropdown menu showing "VA", and "Phone Number:". Below the "Agency/Mode:" dropdown, there is a note: "Agency options will show once your Government Email Address has been validated". At the bottom of the form, there are three buttons: "Register", "Reset", and "Cancel".

Figure 2: Register Account Information page

Note: * indicates required field.

- c. Enter your official government email address in the User Name textbox.
- d. Complete the registration form.

Figure 3: Completed Registration page

Note: The agency domain name used in the email for the username will determine the agency choices displayed in the Agency dropdown list.

- e. Click the **Register** button.
- f. The Login page is displayed with the confirmation message at the top of the page.

Figure 4: Registration Confirmation

After the user has registered, an email is sent containing a temporary password. Use the temporary password to log into the application using the following steps:

- g. Enter your official government email address in the User Name textbox.
- h. Enter the temporary password in the Password textbox.

Figure 5: Log In page

- i. Click the **Log In** button.
- j. The Change Password page displays. Registered

2.2 Change Password

After logging into the application for the first time, you are required to change the password to something that you will easily remember.

1. Enter the temporary password in the Current Password textbox.

Change Password **Password Expired**

*Current Password:

*Create New Password:

*Confirm New Password:

*Create a Hint:

A hint is a meaningful personal association to help you remember your password.

Password must be at least 12 characters long
No password character may be repeated more than 1 time(s) in sequence
Password must contain characters from at least 4 of the following categories.

- Uppercase characters (A through Z)
- Lowercase characters (a through z)
- Base 10 digits (0 through 9)
- Non-alphabetic characters (for example, !, \$, %)

Password will expire 60 days after being set
Passwords cannot be reused within the last 24 changes.

You will be redirected to the login page and will need to login with your new password

Figure 6: Change Password page

- a. Enter your new password in the Create New Password textbox.
- b. Minimum 12 characters
- c. Complexity: minimum of 1 uppercase, 1 lowercase, 1 number, 1 special character
- d. Reenter your new password in the Reenter New Password textbox.
- e. Enter a hint to remind you of your password in the Create a Hint textbox.
- f. Click the **Submit** button.

Note: * indicates required field.

The confirmation message is displayed at the top of the Login page.

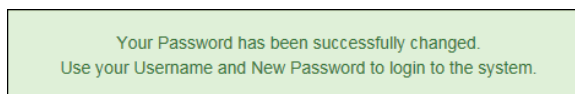


Figure 7: Change Password Confirmation

Note: Ensure that your password meets the system requirements when changing your login credentials. These requirements are displayed at the bottom of the Change Password page.

Note: The Password Expired label is only displayed when the password needs to be changed.

Note: You can change your password at any time by using the above steps after clicking the **Change Password** button on the Home page. The Change Password page can also be accessed from the Utilities dropdown menu located on the Menu bar at the top of the Home page.

Note: To access the additional Utilities menu options from a mobile device; click the additional menus button at the top of the page. Click the Utilities dropdown arrow to display the sub-menus.

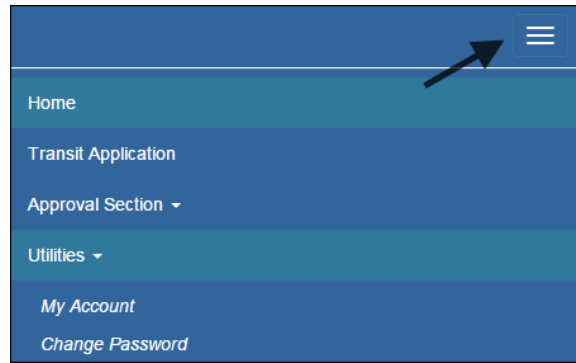


Figure 8: Utilities Menu Options

2.3 Password Recovery

Use the following steps to recover your password.

1. From the Login page; click the [Forgot Password?](#) Link. The Forgot Password page displays.

Figure 9: Forgot Password page

- a. The Show Hint section allows the user to view the Hint entered when the password was last changed. Enter the username and click the **Show Hint** button.
- ♦ The Forgot Password page is redisplayed with the Hint and allows the user to log in from this page.

Figure 10: Show Hint

- b. Send It By Email allows the user to retrieve a temporary password through email. The password is sent to the email address entered when the account was created. Enter your username and click the **Submit** button.

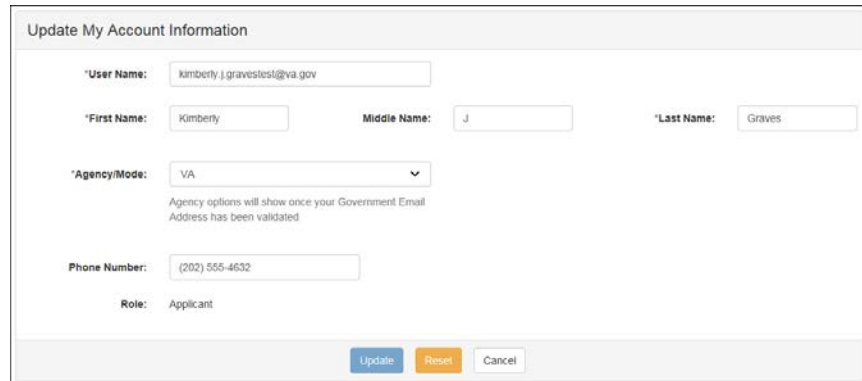
Note: * indicates required field.

- ♦ The Login page displays. Enter the username and the retrieved password. Follow the instructions in **Section 2.2 Change Password** to change the password.

2.4 My Account

The My Account page allows the user to update personal information and to select a proxy. The functionality to assign a proxy is available to Approving Officials: Supervisors, Managers, and Program Admins.

1. From the Home page; click the **My Account** button. The Update My Account Information page displays.



Update My Account Information

*User Name: kimberly.j.gravestest@va.gov

*First Name: Kimberly Middle Name: J *Last Name: Graves

*Agency/Mode: VA
Agency options will show once your Government Email Address has been validated

Phone Number: (202) 555-4632

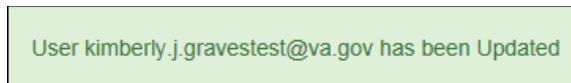
Role: Applicant

Update Reset Cancel

Figure 11: Update My Account page

The information entered when the account was registered is pre-populated in the fields. Update the information as needed.

- a. Click the **Update** button to save the changes. The account information is updated and the Home page is displayed with a confirmation message at the top of the page.



User kimberly.j.gravestest@va.gov has been Updated

Figure 12: Update My Account Confirmation

Use the following steps to select a proxy:

1. From the Home page; click the **My Account** button. The Update My Account Information page displays.

Update My Account Information

*User Name: christine.golladay@dot.gov

*First Name: Christine Middle Name: Nari *Last Name: Golladay

*Agency/Mode: DHS-CIS
DHS-ICE
DOJ-FEDERAL DETENTION
DOT-BTS

Agency options will show once your Government Email Address has been validated

Phone Number: 202-555-3252

Role: Approval/Supervisor

☒ Allow Access to Agency Reports

[Email Agency Report Password](#)

SUPERVISOR Proxy

(not selected) (selected)

Donavon, Matt (DOT-OST-M1- SE)

Add >> << Remove

Users who have you as proxy: Matt Donavon

MANAGER Proxy

(not selected) (selected)

Bellet, Craig (DOT-OST-M1- SE)
Donavon, Matt (DOT-OST-M1- SE)
Mello, Deborah (DOT-OST-M1- SE)
Smith, Kim (DOT-OST-M1- SE)

Add >> << Remove

Users who have you as proxy: Matt Donavon, Kim Smith

[Update](#) [Reset](#) [Cancel](#)

Figure 13: Update My Account Information (Proxy)

Available supervisor and/or managers will be displayed in the Add select box.

2. Select the proxy. Click the **Add** button to add the proxy to the column on the right.

(not selected) (selected)

Donavon, Matt (DOT-OST-M1- SE)

Add >> << Remove

Figure 14: Selected Proxy

To remove a proxy from the column, select the proxy and click the **Remove** button.

Other Approvers that have the logged on user set as their proxy will be displayed below the table.

MANAGER Proxy

(not selected)

Bellet, Craig (DOT-OST-M1- SE)
Donavon, Matt (DOT-OST-M1- SE)
Mello, Deborah (DOT-OST-M1- SE)
Smith, Kim (DOT-OST-M1- SE)

Add >>

(selected)

<< Remove

Users who have you as proxy: Matt Donavon, Kim Smith

Note: You can update your account information at any time by using the above steps after clicking the **My Account** button on the Home page. The My Account page can also be accessed from the Utilities dropdown menu located on the Menu bar at the top of the Home page.

Note: To access the additional Utilities menu options from a mobile device; click the additional menus button at the top of the page. Click the Utilities dropdown arrow to display the sub-menus.

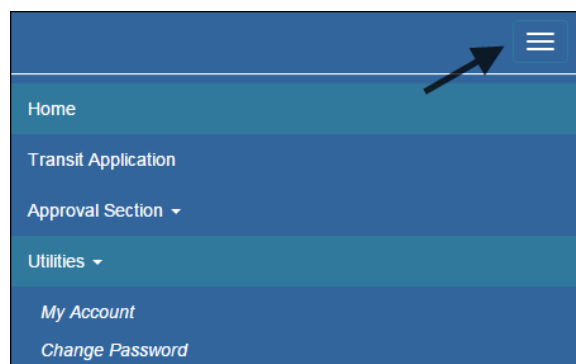



Figure 15: Utilities Menu Options

2.5 Session Time Out

If your session is inactive (i.e., you have not typed data into an existing page, requested a new page, submitted data, etc.) for 45 minutes, you will be automatically logged out.

2.6 Exit

- To exit the system from a desktop, click the **Logout** button on the home page.
- To exit the system from a mobile device, click the additional menu button  at the top of page. Click the Logout button. The Login page is displayed.

3. OVERVIEW OF THE HOME PAGE

The tabs and links available to you on the home page are determined by your assigned user role. User roles are assigned by TRANServe and the Agency Program Office.

The home page is divided into two sections:

- The menu bar displays at the top of the page and displays the following:
 - ♦ Home – Click this tab to display the home page.
 - ♦ Transit Benefit Application – Click this tab to display the Select An Action To Continue page.
 - ♦ Approval Section – This functionality is only available for Approving Officials: **Supervisors, Managers, and Program Admins**. Click this tab to display the available approval levels. Approved Records, Disapproved Records and Completed Records can also be accessed from this tab.
 - ♦ Utilities – Click this tab to display My Account and Change Password sub-menu options.
 - ♦ Admin – This functionality is only available for administrators. Click this tab to display User Admin and/or Role Admin sub-menu options.
 - ♦ Logout – Click this tab to logout of the application.
- The main section of the home page displays buttons representing functions you can execute within the application.
 - ♦ Transit Benefit Application – Click this button to display the Select An Action To Continue page.
 - ♦ Approval Section – This functionality is only available for Approving Officials: **Supervisors, Managers, and Program Admins**. Click this button to display the first level approval page.
 - ♦ My Account – Click this button to display the My Account page.
 - ♦ Change Password – Click this button to display the Change Password page.
 - ♦ Log Out – Click this link to log out of the application system.

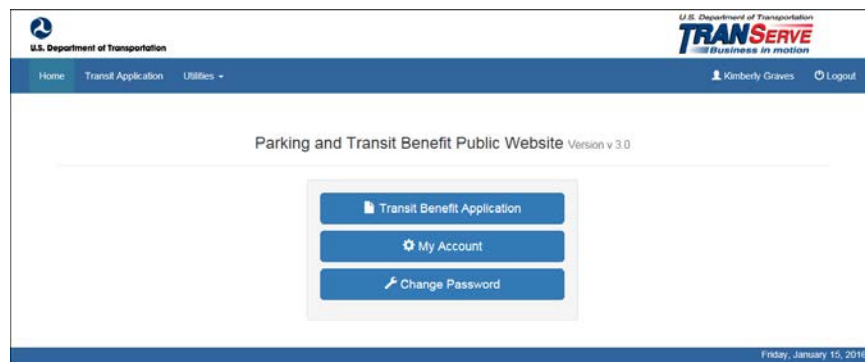


Figure 16: Website Home page

Note: To access the additional menu options from a mobile device; click the additional menus button at the top of the page. The additional menu options are displayed.

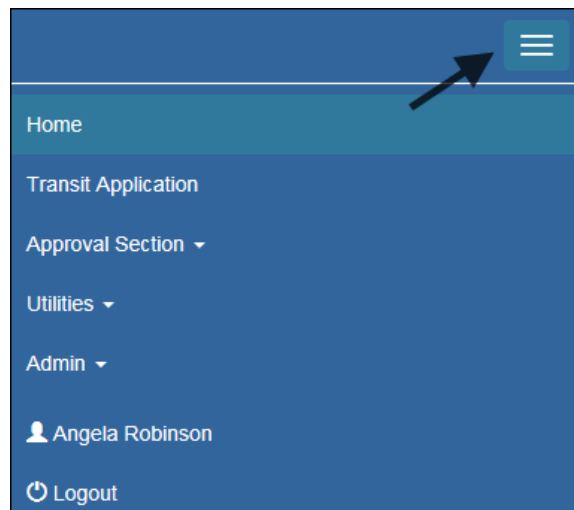


Figure 17: Additional Menu Options

3.1 Transit Benefit Application

The Transit Benefit Application option allows the applicant to request information, withdraw from the program, make address and SmarTrip® changes, and to certify/enroll in the transit benefit program.

1. From the Home page; click the **Transit Benefit Application** button. The Select An Action To Continue page displays.

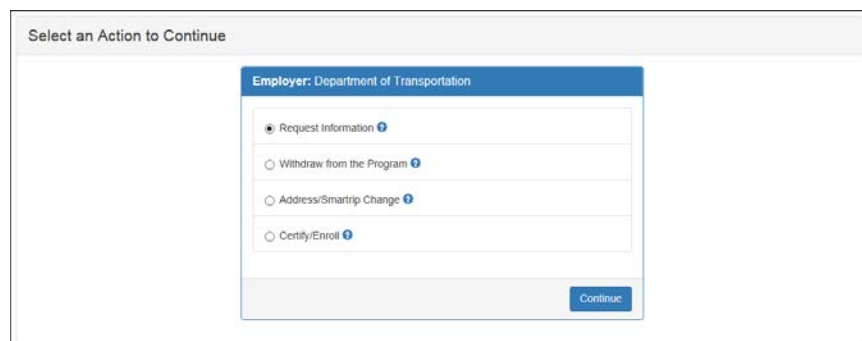


Figure 18: Select An Action To Continue page

3.1.1 Request Information

The applicant can request information from the **Agency Program Office** by submitting questions regarding the transit benefit program or a submitted application through **the Point of Contact (POC)**.

1. The Request Information radio button is selected by default when the page is displayed. Click the **Continue** button to display the Request Information page.

Request Information

Name: Graves (Last) Kimberly (First) Jessica (Middle)

Email Address: kimberly.j.graves@dot.gov

Agency: Department of Transportation

***Point of Contact:** **Select...**
Click the Select button to select Point of Contact

***Question:**

Send Request **Cancel**

Figure 19: Request Information page

- If a POC has been selected it will pre-populate in the Point of Contact textbox. To select a POC, click the **Select** button to display the available POCs in a separate window.
- Select a POC from the list.
- Enter the question or concern in the Question textbox and click the **Send Request** button.
- An email is sent to the selected POC. The Home page is displayed with a confirmation message at the top of the page.

Thank you, your request has been sent.

Figure 20: Request Information Confirmation

3.1.2 Withdraw from the Program

The applicant can submit a request to withdraw from the program at any time.

1. Select the Withdraw from the Program radio button.
 - a. Click the **Continue** button. The Withdraw From The Program page is displayed.

Withdraw from the Program

Identifier: ****

Name: MILLS SHARONDA
(Last) (First)

Email Address: Sharonda.Mills@va.gov

Agency/Mode: Department of V.A. (VA)

*12345: (202) 555-4441

*Withdrawal Date:

Click the Calendar to select a Withdrawal Date

*Approving Official:

Click the Select button to select Approving Official

*Manager/Fund Certifier:

Click the Select button to select Manager/Fund Certifier

Comment for Agency Approvers:

You have 1995 characters remaining

Figure 21: Withdraw From The Program page

- b. Click the pop up calendar to select a withdrawal date.
 - c. Click the **select** button to display the list for your agency's 1st Approvers.

Approving Official

Name Email

Type to filter...

KIM LYONS kim.lyonstest@va.gov

<< < 1 > >>

Close

Figure 22: Approving Official (1st Approver)

- d. Select your Approving Official (1st Approvers).
 - e. Click the **select** button to display the list for your agency's 2nd Approvers.

The screenshot shows a window titled "Manager/Fund Certifier" with a close button (X) in the top right corner. Inside the window, there is a table with two columns: "Name" and "Email". Above the table is a search bar with the placeholder text "Type to filter...". The table contains two rows of data, each with a checkbox icon to the left of the name. The first row shows "GLEN HARPERTEST" with email "glen.harptest@va.gov". The second row shows "JESSICA MARTIN" with email "jessica.martins@va.gov". Below the table is a pagination control with buttons: "<<", "<", "1", ">", and ">>". In the bottom right corner of the window is a "Close" button.

Name	Email
<input checked="" type="checkbox"/> GLEN HARPERTEST	glen.harptest@va.gov
<input checked="" type="checkbox"/> JESSICA MARTIN	jessica.martins@va.gov

Figure 23: Manager Fund/Certifier (2nd Approver)

- f. Select your 2nd Approver.
- g. Enter any information that will assist your Agency Approver with processing your application in the Comment for Agency Approvers textbox.
- h. Click the **Withdraw** button. The request is sent to TRANServe and a confirmation message is displayed at the top of the page.

Thank you, your application to Withdraw from the Program has been submitted.

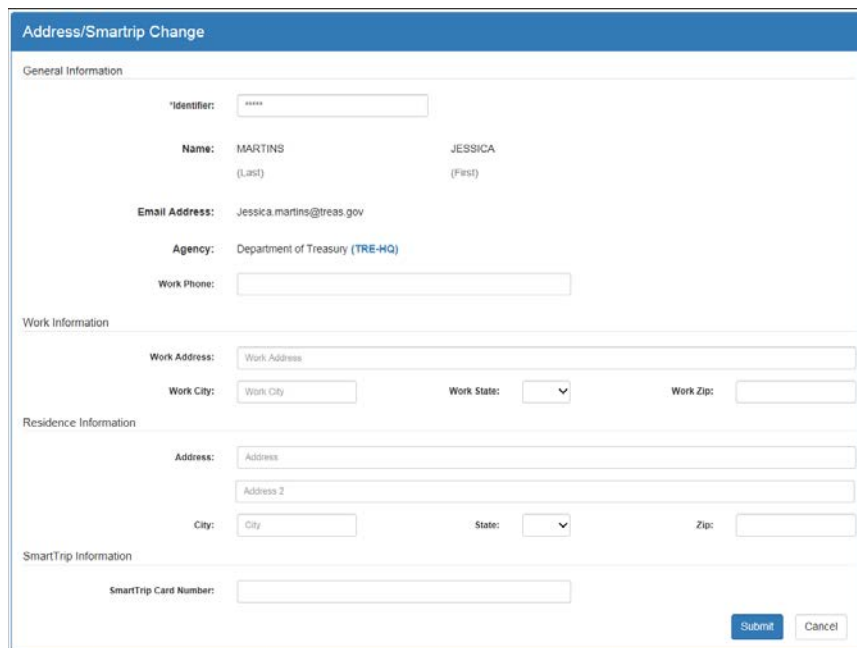
Figure 24: Withdraw Confirmation

Note: The applicant must be enrolled in the Transit Benefit Program to withdraw. Registering a username does not mean that the applicant has enrolled in the program.

3.1.3 Address/SmarTrip® Change

The applicant can submit a request to update an address or SmarTrip® number.

1. Select the Address/ SmarTrip® radio button.
 - a. Click the **Continue** button. The Change Address/ SmarTrip® page is displayed.



The screenshot shows a web form titled "Address/Smartrip Change". It is divided into four sections: General Information, Work Information, Residence Information, and SmartTrip Information. The General Information section includes fields for Identifier (with a masked input), Name (Last: MARTINS, First: JESSICA), Email Address (Jessica.martins@treas.gov), Agency (Department of Treasury (TRE-HQ)), and Work Phone. The Work Information section includes Work Address, Work City, Work State (a dropdown menu), and Work Zip. The Residence Information section includes Address, Address 2, City, State (a dropdown menu), and Zip. The SmartTrip Information section includes SmartTrip Card Number. At the bottom right, there are "Submit" and "Cancel" buttons.

Figure 25: Change Address/ SmarTrip® page

- b. Update the applicable information. Only update the section that needs to be changed. You are not required to complete an entirely new application.
 - c. Click the **Submit** button. The request is sent to TRANServe and a confirmation message is displayed at the top of the page.

Thank you, your Address/Smartrip Change Request has been submitted.

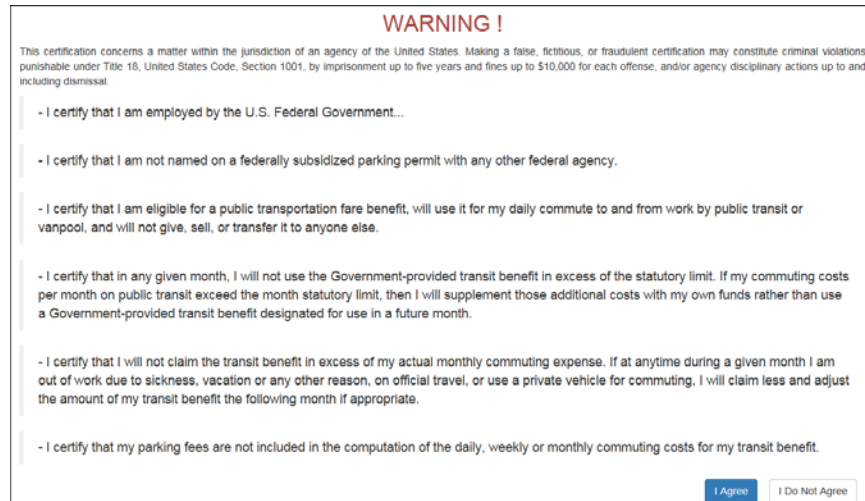
Figure 26: Address/ SmarTrip® Confirmation

Note: The applicant must be enrolled in the Transit Benefit Program to change address/ SmarTrip® information. Registering a username does not mean that the applicant has enrolled in the program.

3.1.4 Certify/Enroll

The Certify/Enroll allows the applicant to enroll in the transit benefit program by submitting an application.

1. Select the Certify/Enroll radio button.
2. Click the **Continue** button. The Warning page is displayed.



The screenshot shows a web form titled "WARNING !" in red. Below the title is a paragraph of legal text: "This certification concerns a matter within the jurisdiction of an agency of the United States. Making a false, fictitious, or fraudulent certification may constitute criminal violations punishable under Title 18, United States Code, Section 1001, by imprisonment up to five years and fines up to \$10,000 for each offense, and/or agency disciplinary actions up to and including dismissal." Below this are six bullet points, each preceded by a hyphen: "- I certify that I am employed by the U.S. Federal Government...", "- I certify that I am not named on a federally subsidized parking permit with any other federal agency.", "- I certify that I am eligible for a public transportation fare benefit, will use it for my daily commute to and from work by public transit or vanpool, and will not give, sell, or transfer it to anyone else.", "- I certify that in any given month, I will not use the Government-provided transit benefit in excess of the statutory limit. If my commuting costs per month on public transit exceed the month statutory limit, then I will supplement those additional costs with my own funds rather than use a Government-provided transit benefit designated for use in a future month.", "- I certify that I will not claim the transit benefit in excess of my actual monthly commuting expense. If at anytime during a given month I am out of work due to sickness, vacation or any other reason, on official travel, or use a private vehicle for commuting, I will claim less and adjust the amount of my transit benefit the following month if appropriate.", and "- I certify that my parking fees are not included in the computation of the daily, weekly or monthly commuting costs for my transit benefit." At the bottom right of the form are two buttons: "I Agree" (highlighted in blue) and "I Do Not Agree" (in a light gray box).

Figure 27: Warning page

3. After reading the message; click the **I Agree** button. The Transit Benefit Application Worksheet is displayed.

Note: *If the applicant does not agree, click the **I Do Not Agree** button to display the Select An Action To Continue page.*

Certify/Enroll

☒ Transit Benefit Application Worksheet

All Transit Benefit Program Applicants are required to certify the **"Total Monthly Expense"** of their **Home to Work Mass Transit Commute**.

Parking fees are not eligible for the transit benefit and must not be included in "Total Monthly Expense".

Instructions: To calculate your "Total Monthly Expense"

- Select your transportation method(s)
- Enter the following information in the "To Work" and "From Work" row(s) of each transportation method:
 - Name of Company for your method of transportation (Metro, BART, Subway)
 - Daily or Monthly Expense
 - Number of days you routinely work in a month
- If you purchase a Monthly pass, divide the price of the pass by 2, and enter the information in the Monthly Expense column
- The Total Monthly Expense value automatically populates

Reason for Certification:

Chosen/Military:

Work Status:

☒ Transit Benefit Transportation Methods

Always follow your Agency work schedule policy for specific guidance on the Days per Month entry.

Defined work schedule examples:

- If you work a Basic schedule of 8-hours per day, the average amount of 20 Days can be entered into the Days per Month column
- If you work a Flex Schedule of 9-hours per day, the average amount of 10 Days can be entered into the Days per Month column
- If you work a Compressed schedule of 10-hour days, the average amount of 16 Days can be entered into the Days per Month column
- If you telecommute or work per piece, enter the number of days you actually commute to/from work.

Select your transportation method(s):

Bus
Other Bus
Bike
Other Method
Vanpool

Every Transit Benefit Program Participant is responsible to adjust the amount of their transit benefit each month to reflect the actual cost of their home to work commute.

Total Monthly Expense:

☒ Transit Benefit Program Application

Identifier:

Name:

Email Address:

Common Identifier:

Department of V.A.

Select Your Agency:

Region:

Address:

Accounting Code:

Routing Symbol:

Location/Building:

I certify that my usual monthly transit commuting costs are:

\$

Work Information

Work Address:

Work City:

Work State:

Work Zip:

Residence Information

Address:

City:

State:

Zip:

Approver Information

Approving Official:

Manager/Fund Certifier:

Point of Contact:

Manager Phone:

SmartTrip Card Number:

Comment for Agency Approver:

You have 1885 characters remaining

Continue
Cancel

Figure 28: Transit Benefit Application Worksheet

Note: * indicates required field.

- Select the reason for certification.

- ♦ Address or SmarTrip® Card Number Change – This selection is only used to make updates to the address or SmarTrip® card number. Do not select this reason if changing transportation amounts. This feature routes the application directly to TRANServe for faster processing.
 - ♦ Agency Change
 - ♦ Annual Certification/Recertification – This selection requires the applicant to certify to completion of the Transit Benefit Integrity Awareness training.
 - ♦ New Transit Benefit Participant – This selection requires the applicant to certify to completion of the Transit Benefit Integrity training.
 - ♦ Rate Change
 - ♦ SmarTrip and Rate Change
5. Select Employment Type. (This feature default to Civilian)
 6. Select your work status. (This feature defaults to Full Time)
 - i. Full Time
 - ii. Part time
 - iii. Intern
 7. Select your transportation method(s).
 - i. Bus

Bus to Work:	Name of Company	Daily Expense	Days per Month	Monthly Expense
Bus from Work:	Name of Company	Daily Expense	Days per Month	Monthly Expense
Other Bus to Work:	Name of Company	Daily Expense	Days per Month	Monthly Expense
Other Bus from Work:	Name of Company	Daily Expense	Days per Month	Monthly Expense
<small>Every Transit Benefit Program Participant is responsible to adjust the amount of their transit benefit each month to reflect the actual cost of their home to work commute.</small>				Total Monthly Expense: \$ 0.00

Figure 29: Bus Method

- ii. Other Bus

Other Bus to Work:	Name of Company	Daily Expense	Days per Month	Monthly Expense
Other Bus from Work:	Name of Company	Daily Expense	Days per Month	Monthly Expense
<small>Every Transit Benefit Program Participant is responsible to adjust the amount of their transit benefit each month to reflect the actual cost of their home to work commute.</small>				Total Monthly Expense: \$ 0.00

Figure 30: Other Bus Method

iii. Rail

Rail to Work:	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>
	Name of Company	Daily Expense	Days per Month	Monthly Expense
Rail from Work:	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>
	Name of Company	Daily Expense	Days per Month	Monthly Expense
Every Transit Benefit Program Participant is responsible to adjust the amount of their transit benefit each month to reflect the actual cost of their home to work commute.				Total Monthly Expense: \$ 0.00

Figure 31: Rail Method

iv. Other Method

Other Method to Work:	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>
	Name of Company	Daily Expense	Days per Month	Monthly Expense
Other Method from Work:	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>
	Name of Company	Daily Expense	Days per Month	Monthly Expense
Every Transit Benefit Program Participant is responsible to adjust the amount of their transit benefit each month to reflect the actual cost of their home to work commute.				Total Monthly Expense: \$ 0.00

Figure 32: Other Method

v. Vanpool

Vanpool:	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>
	Name of Company	Daily Expense	Days per Month	Monthly Expense
Every Transit Benefit Program Participant is responsible to adjust the amount of their transit benefit each month to reflect the actual cost of their home to work commute.				Total Monthly Expense: \$ 0.00

Figure 33: Vanpool Method

vi. Parking

Parking:	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>
	Name of Company	Daily Expense	Days per Month	Monthly Expense
Every Transit Benefit Program Participant is responsible to adjust the amount of their transit benefit each month to reflect the actual cost of their home to work commute.				Total Monthly Expense: \$ 0.00

Figure 34: Parking Method

Note: The Agency must be set up to track parking costs. The Parking cost is separate from the Transit cost and is not calculated together.

Note: If all of the methods of transportation are selected, all of the methods will display in one table.

Note: When filling out the method of transportation table, be sure to follow your Agency's work schedule policies.

Always follow your Agency work schedule policy for specific guidance on the Days per Month entry.				
Defined work schedule examples:				
<ul style="list-style-type: none"> • If you work a Basic schedule of 8-hours per day, the average amount of 20 Days can be entered into the Days per Month column • If you work a Flex Schedule of 9-hours per day, the average amount of 18 Days can be entered into the Days per Month column • If you work a Compressed schedule of 10-hour days, the average amount of 16 Days can be entered into the Days per Month column • If you telecommute or work part time, enter the number of days you actually commute to/from work. 				

Figure 35: Sample Agency Work Schedule Policies

8. Fill out the selected method of transportation table for every method routinely used (i.e. Bus and Rail)

Rail to Work:	STW	\$ 3.20	16	\$ 51.20
	Name of Company	Daily Expense	Days per Month	Monthly Expense
Rail from Work:	BRW	\$ 3.20	16	\$ 51.20
	Name of Company	Daily Expense	Days per Month	Monthly Expense
Every Transit Benefit Program Participant is responsible to adjust the amount of their transit benefit each month to reflect the actual cost of their home to work commute.				Total Monthly Expense: \$ 102.40

Figure 36: Method of Transportation Table

Note: The Monthly Expense and the Total Monthly Expense is automatically calculated when you enter the Daily Expense and the Days per Month.

9. Enter the Identifier. This may be the last four digits of your social security number, your employee identification number or another indicator specified by your Agency. If not sure, you may check the help menu.
10. Enter the Common Identifier. This is information used to activate the TRANServe Card. The card activation key may be a word phrase or number. If not sure, you may check the help menu.
11. Select the Region closest to your physical work location
12. Select the **Admin**.
13. Depending on the Agency three optional fields may be displayed (i.e. Accounting Code, Routing Symbol, and Location/Building). For **INSERT AGENCY NAME** these fields are labeled: **Insert First Approver Title, Insert Second Approver Title and Insert Program Admin Title** Click the **Select** link to display the list for your agency.

Accounting Code: [Select...](#)
Click the Select button to select Accounting Code

Routing Symbol: [Select...](#)
Click the Select button to select Routing Symbol

Location/Building: [Select...](#)
Click the Select button to select Location/Building

14. Enter your Work Information.
15. Enter your Residence Information. (The address from which you routinely commute)
16. Click the **Select** button to display the list for your agency's **1st Approvers**.

Approving Official

Name	Email
Type to filter...	
HARRY CAREY	harry.carey@treas.gov

<< < 1 > >>

Close

Figure 37: 1st Approver

17. Select your **1st Approver**. (Check the help menu to clarify)
18. Click the **Select** button to display the list for your agency's **2nd Approvers**. (Check the help menu to clarify)

The screenshot shows a dialog box titled "Manager/Fund Certifier". It contains a table with two columns: "Name" and "Email". Below the table is a pagination bar with buttons for navigation and a "Close" button at the bottom right.

Name	Email
DARREN CHANG	darren.chang@ed.gov
HARRY CAREY	harry.carey@treas.gov

Figure 38: 2nd Approver

19. Select your 2nd Approver.
20. Click the **Select** button to display the list for your agency's Points of Contact.

The screenshot shows a dialog box titled "Point of Contact". It contains a table with three columns: "Name", "Region", and "Email". Below the table is a pagination bar with buttons for navigation and a "Close" button at the bottom right.

Name	Region	Email
TREASURY POC	DC	POC@Agency.gov

Figure 39: Points of Contact

21. Select your Point of Contact.
22. Enter your SmarTrip® card information. If you have not purchased a SmarTrip®, enter NA. See [Appendix A – SmarTrip® Card Instructions](#).
23. Enter any information that will assist your Agency Approvers with processing your application in the Comment for Agency Approvers textbox.

Transit Benefit Program Application

*Identifier: [Redacted]

Name: RODRIGUEZ (Last) KAREN (First) LYNN LEE (Middle)

Email Address: Karen.rodriqueztest@treas.gov *Work Phone: (202) 555-7764

*Common Identifier: HELLOKITTY

Department of Treasury

*Select Your Agency: TRE-HQ *Region: DC

*Admin: TREASURY
Populates from Select Your Agency

Accounting Code: [Select...]
Click the Select button to select Accounting Code

Routing Symbol: [Select...]
Click the Select button to select Routing Symbol

Location/Building: [Select...]
Click the Select button to select Location/Building

I certify that my usual monthly Transit commuting costs are: \$ 102.40
This field is automatically calculated

I certify that my usual monthly Parking commuting costs are: \$ 192.00
This field is automatically calculated

Work Information

*Work Address: 123 TEST STREET

*Work City: WASHINGTON *Work State: DC *Work Zip: 20560

Residence Information

*Address: 505 GAYLEY AVENUE

Address 2: [Redacted]

*City: LOS ANGELES *State: CA *Zip: 90024

Approver Information

*Approving Official: CAREY, HARRY [Select...]
Click the Select button to select Approving Official

*Manager/Fund Certifier: CHANG, DARREN [Select...]
Click the Select button to select Manager/Fund Certifier

*Point of Contact: TREASURY POC [Select...]
Click the Select button to select Point of Contact

Manager Phone: [Redacted]

*SmartTrip Card Number: 000123456

Comment for Agency Approvers: HELP ME HELP YOU
You have 1979 characters remaining

[Continue] [Cancel]

Figure 40: Completed Transit Benefit Application

24. Click the **Continue** button. The SmartBenefits® Program page is displayed.

Smart Benefits Program

If you would like to enroll in the Smart Benefits Program or are already a Smart Benefits participant, please click the "Yes" button below and someone from the Smart Benefits Team will contact you shortly. The Smart Benefits Program eliminates the need to wait in line to pick up fare cards. Instead, your monthly transit benefit will be downloaded directly to your Smart Benefits Card on the first day of every month.

[YES I would like to enroll] [NO Thank You]

Figure 41: SmartBenefits® Program page

25. Click the **YES I would like to enroll** button to join the SmartBenefits® program. By clicking yes, you agree to have your transit benefit downloaded to your SmarTrip® card the first of every month. (Mandatory for methods that accept SmarTrip®)
 - a. Click the **NO Thank You** button if you do not want to join the SmartBenefits® program.

Note: Your Name, Email Address, Work Phone, and Agency/Mode are pre-populated with the information you entered when you registered. Verify that the information is correct.

26. After clicking the **YES** or **NO** button, a confirmation message is displayed.

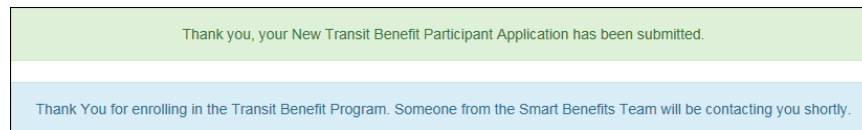


Figure 42: Transit Benefit Program Confirmation

Note: The second confirmation message is only displayed when the applicant enrolls in the SmartBenefits® program.

3.1.5 Monthly Certification

The Monthly Certification option allows the user to recertify without having to update any participant information. Agencies must choose this as a customization option to participate in this certification process.

1. Select the Monthly Certification radio button.
 - a. Click the **Continue** button. The Warning page is displayed.

Figure 43: Warning page

- b. After reading the message; click the **I Agree** button. The Transit Benefit Application Worksheet is displayed.

Note: If the applicant does not agree, click the **I Do Not Agree** button to display the Select An Action To Continue page.

Note: The applicant must be enrolled in the Transit Benefit Program to apply for monthly certification. Registering a username does not mean that the applicant has enrolled in the program.

Monthly Certification

☒ Transit Benefit Application Worksheet

All Transit Benefit Program Applicants are required to certify the "Total Monthly Expense" of their [Home to Work Mass Transit Commute](#).

Parking fees are not eligible for the transit benefit and must not be included in "Total Monthly Expense".

Instructions: To calculate your "Total Monthly Expense"

- Select your transportation method(s)
- Enter the following information in the "To Work" and "From Work" rows of each transportation method:
 - Name of Company for your method of transportation (Metro, BART, Subway)
 - Daily or Monthly Expense
 - Number of days you routinely work in a month
- If you purchase a Monthly pass, divide the price of the pass by 2, and enter the information in the Monthly Expense column.
- The Total Monthly Expense value automatically populates.

Reason for Certification: Monthly Certification

Civilian/Military: CIVILIAN

Work Status: FULL TIME

☒ Transit Benefit Transportation Methods

If you work 8-hour days, enter 20 in the Days per Month column
If you work 9-hour days, enter 19 in the Days per Month column
If you work 10-hour days, enter 16 in the Days per Month column
If you telecommute or work part time, enter the number of days you actually commute to/from work.

*Select your transportation method(s):

Bus Other Bus Rail Other Method Varied

Other Bus to Work:

DRTW
\$ 3.10
20
\$ 62.00

Name of Company
Daily Expense
Days per Month
Monthly Expense

Other Bus from Work:

DRTW
\$ 3.10
20
\$ 62.00

Name of Company
Daily Expense
Days per Month
Monthly Expense

Every Transit Benefit Program Participant is responsible to adjust the amount of their transit benefit each month to reflect the actual cost of their home to work commute.

Total Monthly Expense: \$ 124.00

☒ Transit Benefit Program Application

Smart Benefits Program: NO

Identifier: ****

Name: SHANFFELTER CHRIS (Last First)

Email Address: CHRIS.shanffelter@treas.gov

Work Phone: (202) 555-8989

Common Identifier: TEST

Work Zip Code: 20560

Department of Treasury

Agency/Mode: TRE-HQ

Region: DC

Admin: TRE-HQ-DC

I certify that my usual monthly transit commuting costs are:

\$ 124.00

This field is automatically calculated.

Work Information

Work Address: DC WORK PLACE

Work City: WORK

Work State: DC

Work Zip: 44444

Residence Information

Address: 52 HOME PLACE

City: HOME

State: DC

Zip: 55555

Approver Information

Approving Official: CANBY, HARRY

Manager/and Certifier: DARRIN CHANG

Point of Contact: TREASURY POC

Manager Phone:

SmartTrip Card Number: NA

Comment for Agency Approver:

You have 1995 characters remaining

Continue Cancel

PRIVACY ACT STATEMENT:

This notice is provided pursuant to the Privacy Act of 1974, 5 U.S.C. § 552a. This information is solicited under authority of 5 U.S.C. § 7505. Furnishing the information on this form is voluntary, but failure to provide all or part of the information may result in disapproval of your request for a public transit fare benefit. The principal purposes of the information are to facilitate timely processing of your request, to ensure your eligibility for transit benefits, and to prevent misuse of the funds involved. This information may be disclosed to the Department of Transportation to perform its duties under an interagency agreement. The information may also be used for production of statistics and reports and for periodic review or revalidation of transit benefits. Other routine uses are published in the Federal Register at 65 F.R. 19479 (April 11, 2000).

Figure 44: Transit Benefit Program Application for Monthly Certification

- c. The application displayed is the currently approved application on file. Verify that all pre-populated information is correct and valid.
- d. Click the **Continue** button. The application is redisplayed with a confirmation message.

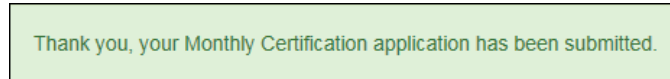


Figure 45: Monthly Certification Confirmation

3.1.6 Disapproved Applications

Applications that have been Disapproved are sent back to the applicant. The applicant must make corrections and resubmit the application.

1. From the Home page; click the **Transit Benefit Application** button. The Select An Action To Continue page displays. The reason the application was disapproved is displayed at the top of the page.

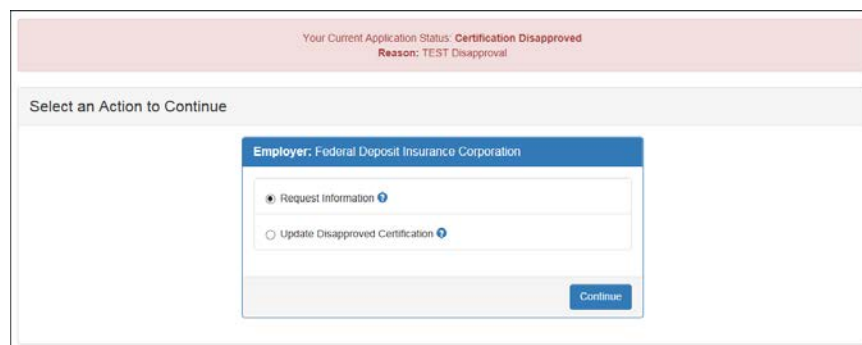


Figure 46: Select An Action To Continue page

- a. Select the Update Disapproved Application radio button.
- b. Click the **Continue** button. The Warning page is displayed.



Figure 47: Warning page

- c. After reading the message; click the **I Agree** button. The disapproved Transit Benefit Application Worksheet is displayed.

Note: If the applicant does not agree, click the **I Do Not Agree** button to return to the **Select An Action To Continue** page.

Click Application and Start Over

Disapproved Reason: Lack

Indicators required fields

Certify/Enroll Make: Certification Disapproved

Transit Benefit Application Worksheet

All Transit Benefit Program Applicants are required to certify the "Total Monthly Expense" of their [Transit to Work Status](#) Transit Worksheet.

Parking fees are not eligible for the Transit benefit and must not be included in "Total Monthly Expense".

Instructions: To calculate your "Total Monthly Expense"

- Select your transportation method(s).
- Enter the following information in the "To Work" and "From Work" rows of each transportation method:
 - Name of Company for your method of transportation (Shuttle, BART, Subway)
 - Daily or Monthly Expense
 - Number of days you routinely work in a month
 - If you purchase a monthly pass, divide the price of the pass by 2, and enter the information in the Monthly Expense column
 - The Total Monthly Expense value automatically calculates

Reason for Certification:

Credent/Military:

Work Status:

Transit Benefit Transportation Methods

Always follow your Agency work schedule policy for specific guidance on the Days per Month entry.

Define work schedule examples:

- If you work a Basic Schedule of 8 hours per day, the average amount of 20 Days can be entered into the Days per Month column
- If you work a Part Schedule of 4 hours per day, the average amount of 10 Days can be entered into the Days per Month column
- If you work a Compressed schedule of 10 hour days, the average amount of 16 Days can be entered into the Days per Month column
- If you take overtime or work part time, enter the number of days you actually complete before work

Select your transportation methods

Back Clear All Add Clear Selection View/Save

To Work	From Work	Daily Expense	Days per Month	Monthly Expense
<div style="display: flex; justify-content: space-between;"> <div> <input type="text" value="BART"/> </div> <div> <input type="text" value="4.00"/> </div> </div>	<div style="display: flex; justify-content: space-between;"> <div> <input type="text" value="BART"/> </div> <div> <input type="text" value="4.00"/> </div> </div>	<input type="text" value="20"/>	<input type="text" value="80"/>	<input type="text" value="\$ 160.00"/>
<small>Name of Company</small>				
<small>Daily Expense</small>				
<small>Days per Month</small>				
<small>Monthly Expense</small>				
<div style="display: flex; justify-content: space-between;"> <div> <input type="text" value="BART"/> </div> <div> <input type="text" value="4.00"/> </div> </div>	<div style="display: flex; justify-content: space-between;"> <div> <input type="text" value="BART"/> </div> <div> <input type="text" value="4.00"/> </div> </div>	<input type="text" value="20"/>	<input type="text" value="80"/>	<input type="text" value="\$ 160.00"/>
<small>Name of Company</small>				
<small>Daily Expense</small>				
<small>Days per Month</small>				
<small>Monthly Expense</small>				

Every Transit Benefit Program Participant is responsible to adjust the amount of their transit benefit each month to reflect the actual cost of their home to work commute.

Total Monthly Expense:

\$ 160.00

Transit Benefit Program Application

Disapproved Reason: Lack

This figure automatically calculates

☐ I acknowledge my commuting costs are above the current \$150.00 tax limit and fully understand I will be responsible for paying these costs on my own.

☐ I do not want my monthly Transit commuting benefit to exceed the current Transit industry tax limit.

Cancel

Enroll

Figure 48: Disapproved Transit Benefit Application Worksheet

- i. The reason the application was disapproved is displayed at the top of the Transit Benefit Application Worksheet and the Transit Benefit Program Application.
- ii. The information the applicant entered when the application was submitted is displayed. Make the required corrections and resubmit the application by clicking the **Continue** button.
- d. Click the **Delete Application and Start Over** button to delete the existing application. Doing this will revert the application back to the last submitted application. If this is their first application using this system, only the Profile information will display.

4. APPROVAL SECTION

The Approval Section allows the authorized user to view, approve or disapprove a transit benefit application. The user must be a 1st Approver, for instance a Supervisor, Approval Officer, or Approval/Supervisor (a combination of the 1st and 2nd Approvers), 2nd Approver, for instance a Manager/Fund Certifier or a 3rd Approver (Program Admin) within the agency to which the application is being submitted. These roles are assigned by the TRANServe Transit Benefit Manager assigned to the Agency or the Agency Transit Benefit Program Office.

Note: Approvers are unable to view or approve their own transit benefit application in an approval queue. 1st and 2nd Approvers will only see an application on which an employee has chosen their name.

4.1 Approval Process

1. Log on as an approver.
 - a. From the Home page, click the **Approval Section** button; approval page is displayed.

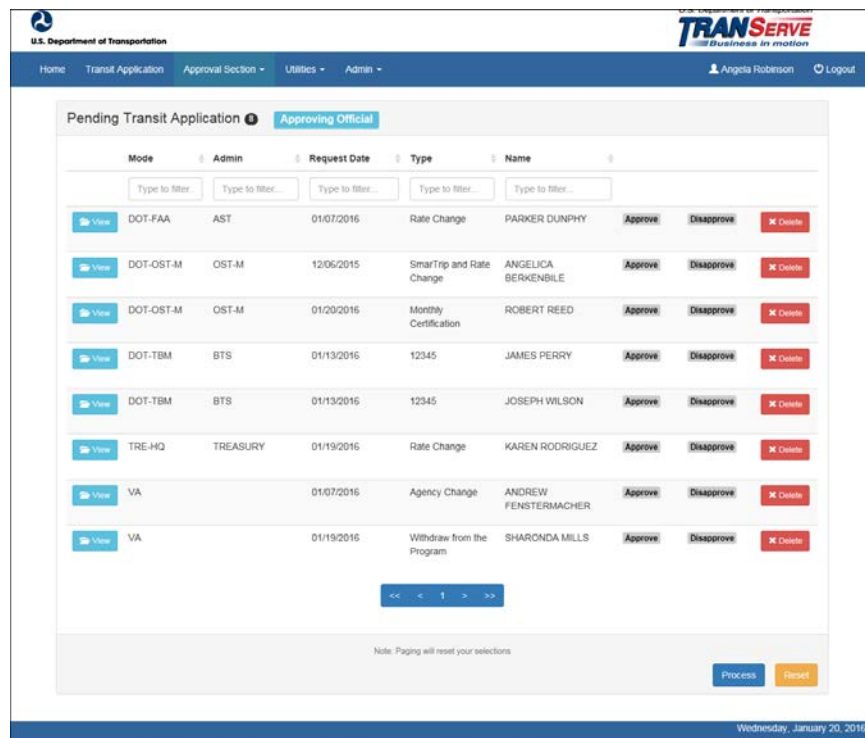


Figure 49: Approval page

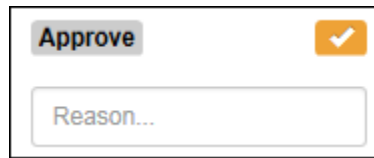
The number of applications awaiting review and approval is displayed next to the page title.

Pending Transit Application 8

- b. Review according to your Agency Policy, and then select Approve to approve the application. After the selection is made the label will change into a checkmark.

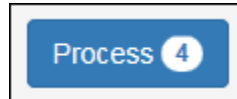


- c. Review according to your Agency Policy then select Disapprove to disapprove the application. After the selection is made the label will change into a checkmark.



- i. A reason is required when an application is disapproved. Enter a reason in the Reason textbox. Where possible give instructions for correction. (i.e. Correct Supervisor's name)

The number of applications approved or disapproved is displayed next to the **Process** button.

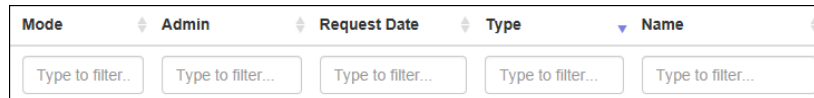


- d. Click the **Process** button to approve or disapprove the application.

Note: Applications can be reviewed, approved or disapproved on the Transit Benefit Worksheet/Application page by clicking the **View** button for the desired applicant.

Note: Applicants can be filtered by entering in the first few letters of the Mode (Agency Name), Admin, Type, and Name. To filter by date, enter in the date the application was submitted in the Request Date filter textbox.

Note: Click the column header, and then click the arrow next to the column header to sort applicants in ascending or descending order.



Note: To access the additional Approval Section menu options from a mobile device; click the additional menus button at the top of the page. Click the Approval Section dropdown arrow to display the sub-menus. Click the sub-menu to enter the appropriate Approval Queue to review an application.

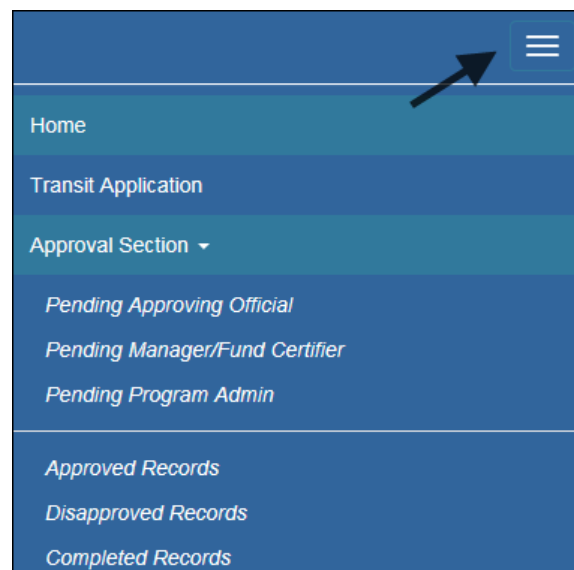
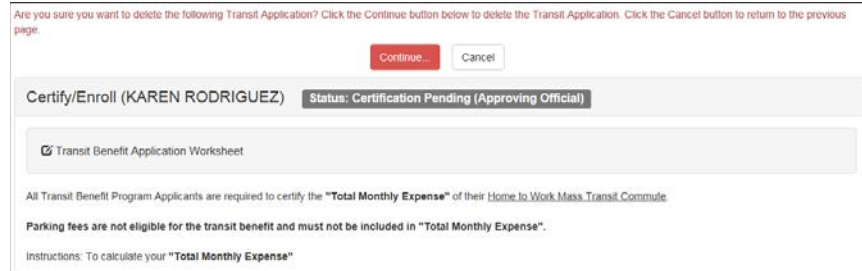


Figure 50: Approval Section Menu Options

4.1.1 Delete Application

Note: *In most cases the applicant should delete their application to begin again. There are times when an approver will need to delete an application. (i.e. an employee separates and the application is still attached to an approver queue, sending the approver reminders.)*

1. Click the **Delete** button. The Delete Confirmation is displayed.



Are you sure you want to delete the following Transit Application? Click the Continue button below to delete the Transit Application. Click the Cancel button to return to the previous page.

Certify/Enroll (KAREN RODRIGUEZ) **Status: Certification Pending (Approving Official)**

[Transit Benefit Application Worksheet](#)

All Transit Benefit Program Applicants are required to certify the "Total Monthly Expense" of their Home to Work/Mass Transit Commute.

Parking fees are not eligible for the transit benefit and must not be included in "Total Monthly Expense".

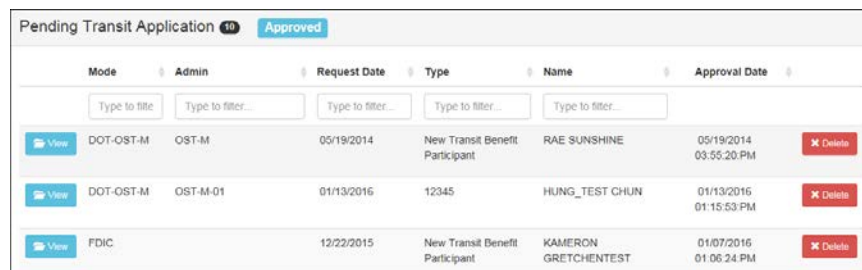
Instructions: To calculate your "Total Monthly Expense"

Figure 51: Delete Confirmation page

- a. Click the **Continue** button to delete the application. The approval page is re-displayed with the delete confirmation at the top of the page.

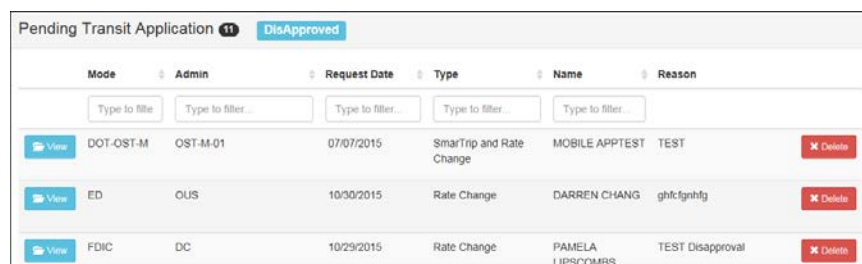
4.2 Approved/Disapproved/Completed Records

- i. From the Home page; hover over the Approval Section menu option. Select the type of records to be viewed by selecting the link name. (Approved, Disapproved or Completed)



Pending Transit Application 10 Approved						
	Mode	Admin	Request Date	Type	Name	Approval Date
View	DOT-OST-M	OST-M	05/19/2014	New Transit Benefit Participant	RAE SUNSHINE	05/19/2014 03:55:20 PM
View	DOT-OST-M	OST-M-01	01/13/2016	12345	HUNG_TEST CHUN	01/13/2016 01:15:53 PM
View	FDIC		12/22/2015	New Transit Benefit Participant	KAMERON GRETCHENTEST	01/07/2016 01:06:24 PM

Figure 52: Approved Records



Pending Transit Application 11 DisApproved						
	Mode	Admin	Request Date	Type	Name	Reason
View	DOT-OST-M	OST-M-01	07/07/2015	SmartTrip and Rate Change	MOBILE APPTTEST	TEST
View	ED	OUS	10/30/2015	Rate Change	DARREN CHANG	ghfcfgnhtg
View	FDIC	DC	10/29/2015	Rate Change	PAMELA LIPSCOMBS	TEST Disapproval

Figure 53: Disapproved Records

- ii. When the Completed Records link is selected; the Find Completed Applications page is displayed. Enter a First Name, Last Name, or select an Agency/Mode from the dropdown to limit the search results. Click the **Search** button to return all completed records.

Find Completed Applications

First Name:

Last Name:

Agency/Mode:

*NOTE: Leave all fields blank to Find all Completed Applications.
Enter any portion of your desired search criteria. The system will search for all entries that begin with the entered values.

Figure 54: Find Completed Applications page

Note: Enter at least one search criteria. If no search criteria are entered the system will retrieve and display all completed records. This load may be quite time consuming.

Mode	Admin	Request Date	Type	Name
<input type="text" value="Type to filter..."/>	<input type="text" value="Type to filter..."/>	<input type="text" value="Type to filter..."/>	<input type="text" value="Type to filter..."/>	<input type="text" value="Type to filter..."/>
<input type="button" value="View"/> DOD-NCR	A-NGB	12/30/2015	Agency Change	ANNIE AARON
<input type="button" value="View"/> DOT-FTA	FTA	09/03/2015	TEST CERTIFICATION	HUNG CHUN
<input type="button" value="View"/> DOT-FTA	FTA	09/04/2015	Agency Change	HUNG CHUN

Figure 55: Completed Records

5. ADMIN

The Admin function allows the Program Office to update users to 1st or 2nd Approver. It is also used by TRANServe to elevate those authorized by the Program Office to the Program Admin level.

Note: To access Admin menu options from a mobile device; click the additional menus button at the top of the page. Click the Admin dropdown arrow to display the sub-menus.

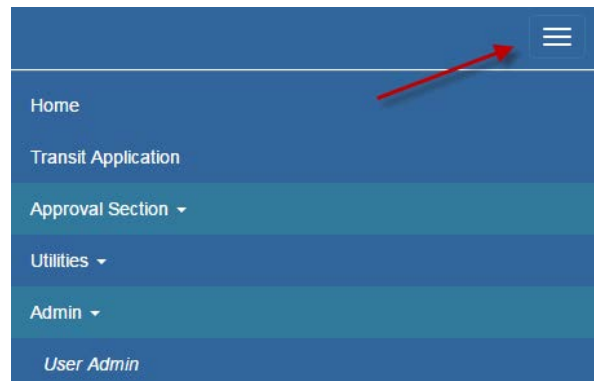


Figure 56: Admin Menu Options

5.1 User Admin

1. Mouse over the Admin menu bar; select the User Admin option. The Find Users page displays.

Figure 57: Find Users page

2. To search for an existing user; enter the Username, First Name, Last Name, or select an Agency/Mode or Role from the dropdown menu.
3. Click the **Search** button. The Search Results page displays.

Note: At least one search criteria field should be entered; if no search criteria are entered the system will retrieve and display all users. This load may be quite time consuming.

	User Name	First Name	Last Name	Mode	Role	
1	tammydehl@usda.gov	Tammy	Dehl	USDA	Manager/Fund Certifier	Delete
2	frederickgaines@usda.gov	Frederick	Gaines	USDA	Manager/Fund Certifier	Delete
3	aden.jeffers@usda.gov	Aden	Jeffers	USDA	Applicant	Delete

Figure 58: Users Search Results page

Note: Applicants can be filtered by entering in the first few letters of the Mode, First Name, Last Name, and Role.

5.1.1 Add User

1. From the User Admin page; click the **Add New User** button. The Account Information page displays.

Figure 59: Add User Account Information page

- a. Enter the applicant's official government email address in the User Name textbox.
- b. Complete the account information form.
- c. Select the user role from the Role dropdown.
- d. Click the **Add User** button. The Add User Confirmation displays.

Figure 60: Add User Confirmation

Note: * indicates required field.

Note: The agency used in the email for the username will determine the agency names displayed in the Agency dropdown.

Note: This page can also be accessed by hovering over the Admin menu option and clicking the Add New User sub-menu option. In most cases all users should create their own profile using the Registration

process on the login page. When an Admin creates a new user, they also create a communication chain to inform and educate the user to obtain the password through their official government email address. This slows the process and also defeats the control point of the user providing all certified information. Program Offices should instruct 1st and 2nd Approvers regarding the use of this feature.

5.1.2 Update User

1. From the User Admin page; click the [Username](#) link. The Update User Account Information page displays with the applicant's information.

Figure 61: Update User Account Information page

- a. Update the applicant's user information.
- b. Click the **Update User** button. The Update User Confirmation displays.

User eddie.makaltest@ed.gov has been Updated

Figure 62: Update User Confirmation

Note: * indicates required field.

Note: After the Add User button is clicked the page re-displays as the Update User Account Information page. Updates can be made on this page.

5.1.3 Delete User

1. From the User Admin page; click the **Delete** button. The Confirm Delete message displays.

Figure 63: Confirm Delete Message

- a. Click the **Delete** button to confirm deletion. The Delete Confirmation is displayed.

User eddie.makaltest@ed.gov has been Deleted

Figure 64: Delete Confirmation

***Note:** Program Offices should instruct 1st and 2nd Approvers regarding the use of this feature.*

5.1.4 Bulk Update View

The Bulk Update View allows the administrator to update multiple user roles at one time.

1. From the User Admin page; click the **Bulk Update View** button. The Bulk Update View page displays.

The screenshot shows the 'Bulk Update View' interface. At the top, there are buttons for 'Add New User' and 'Individual View', and a 'Bulk Role Update' dropdown. Below is a 'User Admin' section with a table. The table has columns: User Name, First Name, Last name, Mode, and Role. There are three rows of user data. Each row has a 'select' button next to the username. At the bottom right, there are 'Process' and 'Reset' buttons.

User Name	First Name	Last name	Mode	Role
select tammydehl@usda.gov	Tammy	Dehl	USDA	Manager/Fund Certifier
select frederickgaines@usda.gov	Frederick	Gaines	USDA	Manager/Fund Certifier
select aden.jeffertest@usda.gov	Aden	Jeffers	USDA	Applicant

Figure 65: Bulk Update View page

5.1.4.1 Single User Role Update

1. Click the **select** button next to the username. The button changes to a check mark after it is selected.

The screenshot shows the 'select' button next to the username 'frederickgaines@usda.gov' has been replaced by a green checkmark.

Figure 66: Single Username Select

- a. Click the down arrow for the User Role dropdown menu.

The screenshot shows the dropdown menu for the User Role. The dropdown is open, showing a list of roles: Manager/Fund Certifier, Test Role, Read Only, Applicant, Approving Official, Approving Official (highlighted), Approval Supervisor, Program Admin, TRANServe TBM, TRANServe Admin, and System Admin.

Figure 67: Role Change Select

- b. Select the desired user role from the dropdown menu.

The screenshot shows the dropdown menu for the User Role. The dropdown is closed, and the role 'Approving Official' is selected.

Figure 68: Role Update

- c. Click the **Process** button. The Confirm Bulk Update message is displayed.

The screenshot shows the 'Confirm Bulk Update' dialog box. It asks 'Run Bulk Update for selected 1 User(s)?' and has 'Cancel' and 'Process' buttons.

Figure 69: Confirm Bulk Update Message

- d. Click the **Process** button to confirm the update and close the dialog box. A confirmation message is displayed at the top of the page.

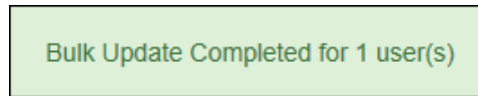


Figure 70: Role Update Confirmation

Note: If the user is associated with an Agency that has multiple Modes/Agency Names, the Mode can be updated using the same steps used to update the User Role.



Figure 71: Multiple Modes

5.1.4.2 Multiple User Role Update

1. Click the **Select** button next to the usernames. The button changes to a check mark after it is selected.

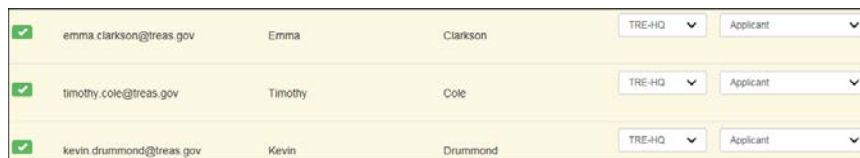


Figure 72: Multiple Username Select

- a. Click the down arrow for the Bulk Role Update dropdown menu at the top of the page.

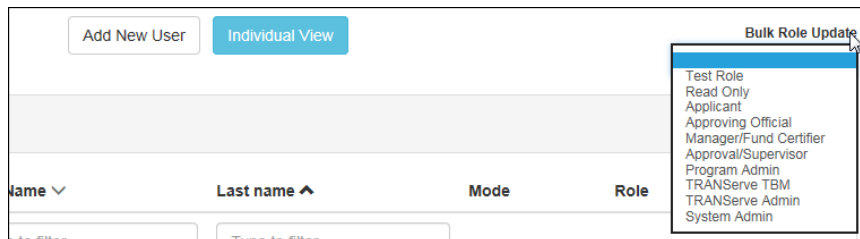


Figure 73: Bulk Role Update Select

- b. Select the desired user role from the dropdown menu.



Figure 74: Bulk Role Update

- c. Click the **Process** button. The Confirm Bulk Update message is displayed.

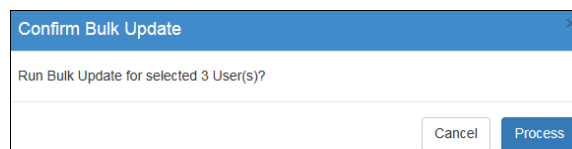


Figure 75: Confirm Bulk Update Message

- d. Click the **Process** button to confirm the update and close the dialog box. A confirmation message is displayed at the top of the page.

Note: Program Admins can only update user roles below the Program Admin level within their Agency.

TRANServe Admins can only update user roles below the TRANServe Admin level.

TRANServe Transit Benefit Managers can only update user roles below the TRANServe TBM level.

5.1.4.3 Role Update Lock

Approvers that have applications in pending status cannot have their roles updated. This will ensure that applications are not orphaned when user roles are changed. This includes applications that are anywhere in the approval process. The number of pending applications is displayed in place of the **Select** button.



Figure 76: Pending Application Link

1. Click the number next to the username to display the Pending Transit Benefit Application Status page.

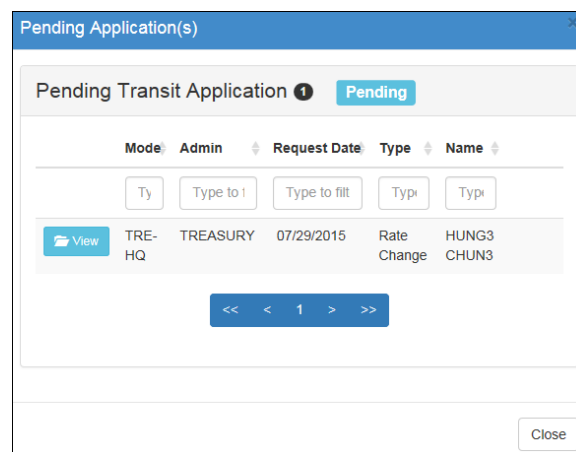


Figure 77: Pending Transit Benefit Application Status page

- a. Click the **View** button next to the applicant's name. A confirmation message is displayed. Click the **OK** button.

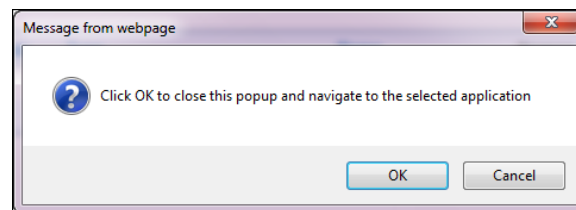
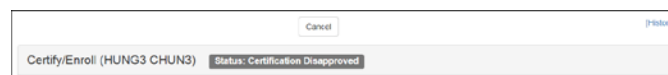
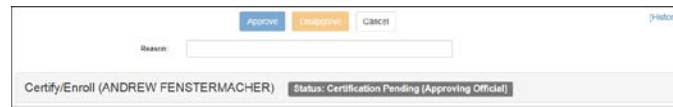


Figure 78: Open Application Confirmation Message

The application is opened. If the status is at the final approving level the application is approved and will display the status at the top of the page (i.e. CERTIFICATION DISAPPROVED or WITHDRAWAL APPROVED).



If the application needs further approval the buttons will display at the top of the page along with the pending certification level.



The screenshot shows a web interface with three buttons at the top: "Approve" (blue), "Certify/Enroll" (orange), and "Cancel" (grey). Below these buttons is a "Reason:" label followed by a text input field. At the bottom of the interface, there is a grey bar containing the text "Certify/Enroll (ANDREW FENSTERMACHER)" and a status box that reads "Status: Certification Pending (Approving Official)".

APPENDIX A: SMARTRIP CARD INSTRUCTIONS

For SmartBenefit Participants: Purchase and Register a SmarTrip® card

SmarTrip® card usage is mandatory for all participants in the National Capital Region.

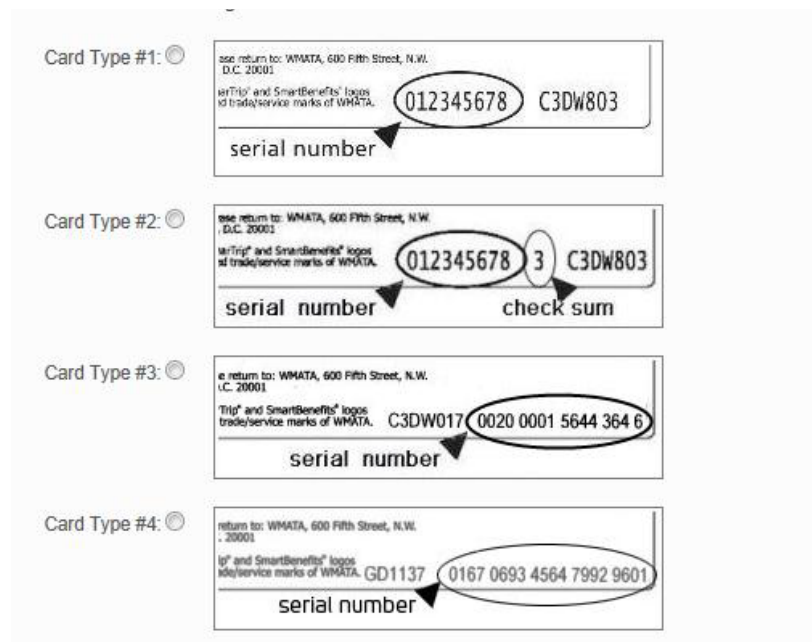
1. Purchase a SmarTrip® Card – This is a reloadable electronic fare card. Using a reloadable card supports government initiatives to support and improve the environment through more sustainable practices.
 - i. a. You can purchase at a Metro Sales Store, Station Kiosk (these are located in Stations where parking is available, a Commuter Store and many retail establishments.

Note: Look here for more information on locations: <http://www.wmata.com/fares/purchase/where.cfm>

- ii. You can also purchase a SmarTrip® Card on line: <http://www.wmata.com/fares/purchase/>

Note: An online order requires you to provide a shipping address which must match the billing address on line with your credit card provider.

- b. Create a Personal Account to register your SmarTrip® Card. You must register your SmarTrip® card with WMATA in order to receive your transit benefit electronically. Registration may take up to 48 hours to be reflected in the WMATA system. An additional benefit of registering your card is to protect the funds on the card. If lost or stolen you may cancel the card. After you replace your SmarTrip® card, you can transfer the funds to the new card.
 - i. Register your SmarTrip® card here: <https://SmarTrip.wmata.com/Registration/Register.aspx>
 - ii. You must indicate the type of card by matching the serial number on the back with the pattern that is circled below:



TIP 1: Enlarge the number on a Xerox machine and attach to your application

TIP 2: If your SmarTrip® (or CharmCard) serial number is fewer than nine (9) digits, you need to add zero(s) to the front to make it nine (9) digits.

APPENDIX B: ON DEMAND REPORTS

“On Demand Reports” refers to a system enhancement TRANServe implemented in August 2015 that permits your Agency to designate that certain staff have access to on demand reporting. To authorize this, the Program Office must contact the TRANServe Transit Benefit Manager assigned to your agency and designate the individual by name, email address and phone number.

(Reference [TSB-2014-14 Reports in the Web Application](#))

These Reports are available:

1. Alpha Listing
 - a. This is a current listing of Active Participants
 - i. This list refreshes once daily
2. Add Customers Report
 - a. This is a list of Participants who were added to the Transit Program during the past 30 days
 - i. This list refreshes daily
3. Removed Participants Report
 - a. This is a list of Participants who were removed from the Transit Benefit Program during the past 30 days
 - i. This list refreshes daily
4. Auto-Withdrawn Report
 - a. This is a list of participants who haven't claimed any transit benefit within the period of time specified by the Agency and were removed from the program.
 - i. i.e. 60 days
 1. Auto-Withdrawn participants are expected to re-enroll when they choose to participate in the transit benefit program again.
5. TRANServe Card Replacement Report
 - a. This is a list of Participants who have requested a new TRANServe Card due to issues not associated with the scheduled expiration and replacement of their card.
 - i. This list includes the delivery location
 - ii. This list refreshes daily
6. TRANServe Card Transactions Report
 - a. One week transaction detail of all TRANServe Card transactions
 - i. This list refreshes weekly

7. Not Picked Up Report

- a. This is a list of program participants who are funded each month, but have never used the Transit Benefit
 - i. This list refreshes daily

8. Electronic Application System Summary Report

- a. This is a three month snapshot of all application requests submitted electronically through TRANServe's application system.
 - i. This includes
 - 1. New Applications
 - 2. Recertifications
 - 3. Changes
 - 4. Withdrawals
 - ii. This list refreshes Quarterly

To use the On Demand Reports feature, follow these steps:

Remote Report Instructions for Agencies already using the Electronic Application System:

- 1. Contact your Transit Benefit Manager (TBM) to request access to On Demand Reports**
- 2. After notification that the reports are available on the following day, complete these steps**
 - a. Log into <https://transitapp.ost.dot.gov/>
 - b. Scroll over the "UTILITIES" header and select "My Account"
 - c. Click the link that says "Email Agency Report Password"
 - d. The password will be emailed to the user

Note: Passwords expire monthly. New Passwords are emailed to you each month by

APPENDIX C: CHANGES TO TRANSERVE.DOT.GOV INFO